EDITORIAL STAFF

THOMAS A. FOSTER
Editor-in-Chief
(215) 964-4388

NANCY ENTWISLE
Associate Editor
(215) 964-4390

JOSEPH V. BARKS
Editor
(215) 964-4379

BRUCE HEYDT
Associate Editor
(215) 964-4381

DENIS J. DAVIS
Senior Associate Editor
(215) 964-4385

BARBARA MACAK
Production Coordinator
(215) 964-4387

EMILY BARR
Production Manager
(215) 964-4384

CONTRIBUTORS

COLIN BARRETT
(703) 860-8521

JESSE C. JESSEN
(215) 444-5925

JOHN BETZ
(303) 422-4959

DR. RICHARD LANCIONI
(215) 322-5123

STAN CHAPMAN
(703) 536-8398

JEAN STRICKLAND MURPHY
(202) 628-0934

KURT C. HOFFMAN
(804) 282-6213

BOB ROBERTS
(703) 536-8398

R. LYNN HURLBERT
(602) 231-6405

FRANK E. SHAFFER
(312) 934-6919

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"Supercarrier components are usually too autonomous to offer any collective benefits. Supercarriers tend to be generalists in all modes, but specialists in only one or two."—**D.W. Hack, manager traffic and distribution, National-Standard, Niles, Mich.**

"Great opportunity for large shippers, but will small shippers be neglected?"—**Jerry Jasper, traffic manager, Reilly Tar & Chemical Corp., Indianapolis.**

"With the large country that we have, rail can provide distance economy and trucking the localized service necessary to complete the delivery with costing for the entire job included."—**R.A. Christian, director of distribution, Mobay Chemical Corp., Pittsburgh.**

"Deregulation has not fostered competition; it has eliminated it. Whoever is left, for the most part, will become supercarriers with super-high rates. It may not happen next year or the year after that, but it will happen, wait and see."—**James Sergas, manager of transportation, Honeywell Inc., Fort Washington, Pa.**

"I feel and believe that the supercarrier, with hundreds of terminals and a vast organizational structure, must lose the close contact that the small carrier has with its shippers. To me, that contact is important."—**William Langer, director of traffic, Art Steel Co., Bronx, N.Y.**

"One carrier to handle all modes of transportation would eliminate congestion at the shipper's location; you would need only one tariff, and there would be only one salesman. But there is one problem: there would be no competition, and no leverage. Competition serves the public better in the long run."—**Ron Williamson, president, RJW Enterprises Inc., Bloomingdale, Ill.**

IT'S A SUPERCARRIER!

I dislike the idea of one-stop, supercarrier service	50%
I like the idea	28%
The greatest benefit is . ease of routing	66%
. ease of rating and rate negotiations	53%
. carrier accountability	47%
Railroads could best offer supercarrier service	34%
Motor carriers could best offer this service	38%
Airlines are least equipped to handle this service	44%
Steamship lines are least equipped	25%
This service is valuable for international movements	50%
Of equal value for domestic or international	28%

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DISTRIBUTION'S FORECAST

We're now going to provide quarterly previews of the economic indicators that impact directly on your distribution operations. Here are some numbers to help you plan how lively this spring will be.

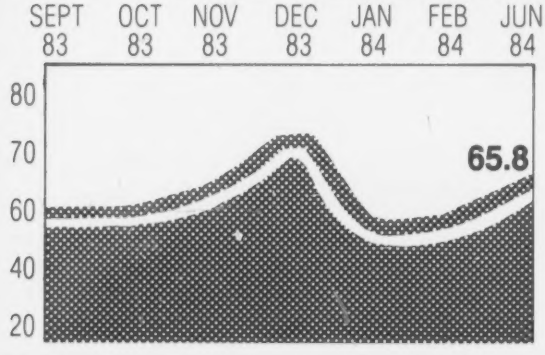
By Dr. Richard Lancioni, Contributing Editor

GENERAL ECONOMIC INDICATORS

	1st QUARTER '84	2nd QUARTER (forecast)
Real GNP (trillions)	$3,843.7	$3,910.5
Retail Car Sales (Mil. units, annual rate)	10.5	10.6
Housing Starts (Units, annual rate)	1,635,300	1,586,900
Prime Rate (%)	11.1	11.3
Mfg. Employment (Millions)	19,400	19,800
Diesel Fuel (Price/Gal.)	$1.31	$1.35

Distribution managers should continue to experience high order levels and increasing demand for improved customer service levels. The expected low inflation rate will result in increased orders on all levels in the distribution channel, with wholesale distribution activity expected to increase dramatically as retail sales grow. The distribution manager should resist temptations to expand inventories, for despite the expected slow growth in interest rates, it is still uncertain what level they will eventually reach. A sudden surge could mean high borrowing costs for inventory expansion. Transportation costs should remain fairly constant during the first half of the year, with fuel charges expected to increase only moderately. Diesel fuel will increase from $1.31/gallon in March to $1.33-$1.35/gallon through the second quarter. Jet fuel as well will increase only slightly. The labor scene in transportation remains relatively quiet, with no major surprises expected. In fact, most carriers will continue to ask unions to consider pay reductions through 1984.

PURCHASING MANAGERS COMPOSITE INDEX



The index represents the combined rankings of purchasing agents in more than 250 industrial companies across the country. The index looks at employment, production, the number of new orders, and inventories among those companies, which represent more than 40 industries. The purchasing managers are generally optimistic about the first half of 1984. In the employment area, most purchasing agents remain confident that employment will increase slowly, which is consistent with the drop in unemployment shown above. At the same time, the purchasing index reflects a continuing upturn in production with only a small percentage indicating a decline in factory production. More than half expect the strong increase in new factory orders that characterized the last quarter of 1983 to continue through the first part of the year. Also, only about one-third of the purchasing agents expect inventories to rise during the first half of 1984.

DISTRIBUTION INDEX
Quarterly Shipper Forecast

	CURRENT QUARTER	2nd QTR. FORECAST	NET CHANGE
Truck Shipments	131.6	136.2	+4.6
Rail Shipments	118.5	121.7	+3.2
Air Shipments	124.2	126.7	+2.5
Water Shipments	114.7	115.8	+1.1
Warehouse Space Utilization	126.8	129.9	+3.1
Inventory Valuation	109.9	111.1	+1.2

Distribution managers are experiencing their highest shipment levels since 1979. The increase is reflected in the strong growth in the transportation sectors in the first quarter. The 4.6-point growth in truck shipments is significant, because the trucking sector has not experienced such an increase since the first part of 1980. The rise in rail shipments is attributable to high raw material shipments and the increase in piggyback moves. Air shipments will also rise, but by a smaller amount. Water modes are up and will continue to grow through the second period. Again, this is because of upward trends in bulk shipments and expected increases in metal and steel production. Warehouse space utilization is expected to match the performance of the transport modes, with a 3.1-point increase, reflecting a modest inventory building that has taken place. Finally, inventory valuation, a key indicator of future inflation rates, will rise by only 1.2 points.

SUPER (MARKET) STRATEGIES: THE BOXCAR'S NEW ROLE

The latest round of deregulation, which went into effect January 1, was intended to save the boxcar. But according to many non-perishable food shippers, boxcars still face stiff competition from motor carriers and even piggyback service. Will the Eighties be known as the decade the boxcar was sunset by grocery shippers?

(Part Two of a two-part series.)

By Nancy Entwisle, Associate Editor

Ever wonder what happened to those great steam locomotives, one of which was known as "The Iron Horse" in John Ford's classic movie by the same name? Well, most were sent to museums in the 1950s, when the railroads switched to diesel fuel, thus ending an era and beginning a long period of decline and change for the steel-wheeled industry.

In the 1960s, fast cars and planes with bars became all the rage, and people forsook trains when taking long trips. Less-glamorous freight trains also began to have their problems, in the face of stiff competition from motor carriers.

In the 1970s, "training" hit its lowest point in history, and Congress felt compelled to save six bankrupt railroads and create Conrail. Other railroads could not be saved, however. Some of their "luckier" cars were turned into things such as the Choo Choo Hilton Hotel in Chattanooga. Most of the others were either abandoned on the spot or converted to scrap metal.

Today's question is: Will this be the destiny of boxcars?

Save the Boxcars

The intent of boxcar deregulation is to enable railroads to attract back some of the business lost to the motor carriers. Many food shippers, however, still find themselves turning to trucks more often than boxcars.

Arthur Klawans, vice president of industry affairs for the National

continued

Food Distributors Assn. (NFDA), reports that "canned goods are mostly shipped by boxcar for the longhaul on the West Coast, in the Midwest and in the East. If the railroads can make themselves competitive with trucks on freight rates now," Klawans believes, "they're going to get some of the other business back that's presently on the trucks. But they've got to be competitive in terms of transit time, too."

On a volume basis, the Quaker Oats Co., headquartered in Chicago, moves about 60 percent of its products via rail and 40 percent with motor carriers. "Therefore," says James Mann, director-transportation, "we have definite interest in boxcars. But as far as our own company is concerned, we don't feel that we're captive to the railroads. We still have the opportunity of going piggyback or over-the-road with most of our finished products.

"Basically, the railroads are using the old tariffs," Mann reports. "As far as the future goes, I would expect that as the railroads figure out what their market is and where their low spots are, there will be some upward adjustments-individually rather than across the board-of rates we've had in the past on canned goods, grain products, and whatever else in the food business."

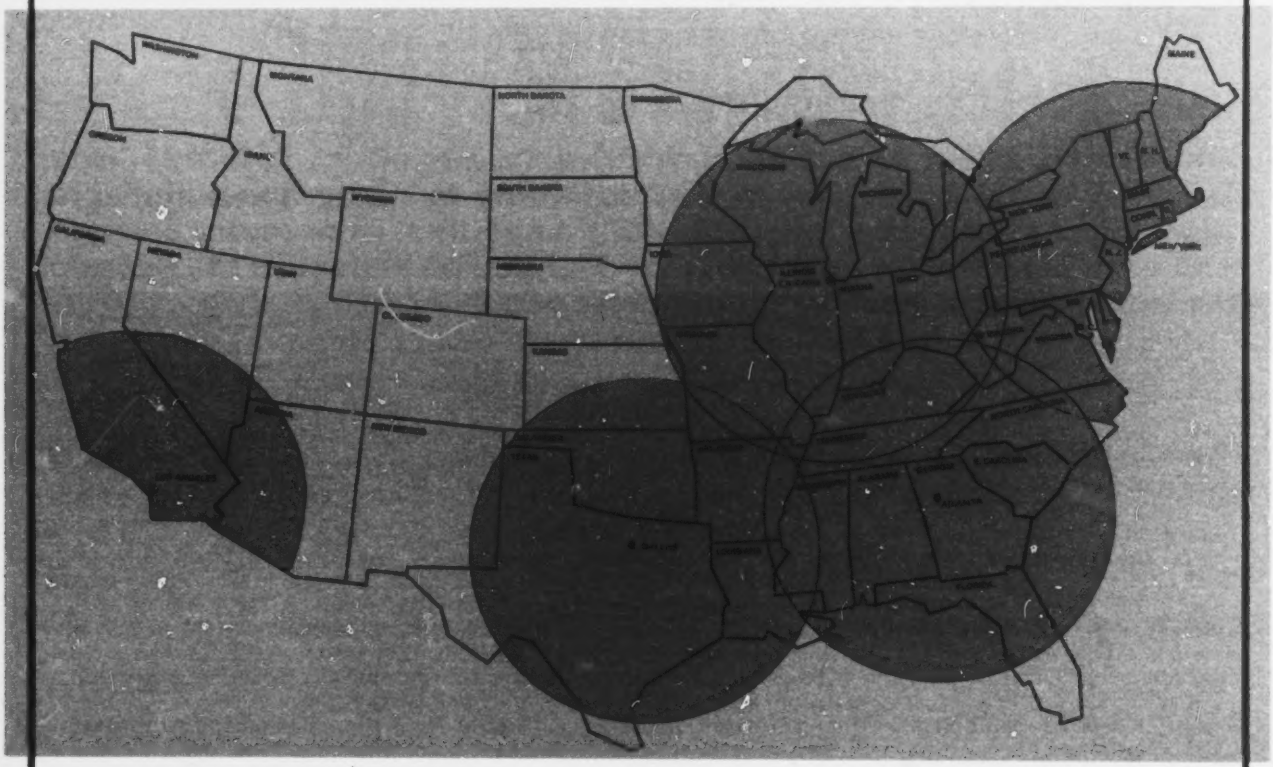
But Mann is nevertheless optimistic. "Hopefully," he says, "boxcar deregulation will do two things: First, it will give the railroads a chance to price and react more rapidly to their competition, meaning over-the-road carriers. Secondly-and this is Conrail's aim, which is a worthy one-it will reduce the empty miles which today's system generates. That will reduce costs and make it possible for the railroads to reduce rates by using their equipment more efficiently."

Already, it looks like Conrail has made some progress in this area. In cooperation with connecting carriers such as the Burlington Northern, Santa Fe and Union Pacific, Conrail has established new lower independent factor prices for single-car movements of canned goods from the West Coast to Conrail and connecting-line destinations in the East.

Conrail says the new prices, which went into effect last month, were encouraged by boxcar deregulation. They are called "independent factor" prices because, like regulated rates, they can bechanged quickly to meet market needs. The new prices from origin to destination will be from 10 to 20

continued

This map of the contiguous 48 states shows the five major distribution areas (each with a 400-mile radius) which cover 42 percent of the land area, but 91 percent of the sources of consumable goods. The stores within the radii of these five points can expect 24- to 48-hour service for their consumable goods. It has been estimated that 70 percent of the freight moved in the U.S. is food or food-related products. Interestingly, geography does not determine the consumption of goods; it is determined by raw- and in-process material users, as well as finished product users (consumers). Industry, governments, private institutions, public institutions and individual consumers comprise these types of users. In other words, consumption takes place where the jobs are, where the people are, where the institutions are. The so-called "in-between" markets, such as the Dakotas, Montana, New Mexico and the like, have learned to accept delays of up to three or four days for their noncritical goods. (Excerpted from a paper entitled "The 1980s' Impact on the 'Classic' Food Distribution Pattern," by Arthur Klawans, vice president of industry affairs for the National Food Distributors Assn.)



percent below existing single boxcar rates, Conrail says; in other words, fully competitive with TOFC and truck rates.

Doing Time

Like Art Klawans, Jim Mann is concerned about transit time. "If you're going to switch product off the road and back into boxcars, you're also going to have to take a look at the service level provided. I think you'll find a greater latitude when you talk about moving from a plant to a warehouse-like a Quaker plant to a Quaker distribution center-than you would when shipping from a plant or a distribution center to a customer, where the delivery time is a little bit more critical.

"In the grocery trade, acceptable rail delivery time has been plus or minus a day of the requested arrival date, whereas motor carriers are there usually on the hour," Mann notes. "You have to consider the cost, safety and inventory factors if you're going to deliver by rail."

Mann suggests that some customers might prefer rail because they have two days to let the boxcar sit; the customers can then use their own warehouse labor staff any way they want to, and pick the products or cars they want to unload first. "But if you get the motor carrier in there," he adds, "you have two hours to unload a palletized shipment. You'd better get those trailers unloaded."

Boxcar Blues

Fleming Foods of Pennsylvania, located in Oaks, Pa., is a subsidiary of Fleming Companies, Inc. Fleming Foods is a wholesaler and distributor serving Pennsylvania, New Jersey, Delaware, Maryland, the District of Columbia and Northern Virginia.

The rail carrier for Fleming is Conrail, and Ken Collins, the plant's distribution manager, says he would be happy if he never had to use a railroad again. As it is, Fleming Foods receives only about five percent of its inbound freight by rail. "The company," says Collins, "keeps rail to a minimum because using motor carriers is more productive, cheaper, and there is less damage."

When a boxcar comes in, Collins says, it must be unloaded in one day or the railroad will charge Fleming $20 to $60 per day "overtime." This includes the times when 15 railcars arrive at the warehouse unexpectedly, and all 15 must be unloaded within 24 hours of arrival.

"The railroads are too independent," says Collins. "They're rarely on time-they're either way too early or way too late-and when *they* make the mistake, they charge *you* to take care of it! Our industry can't stand it."

Truckers at Heart

"As for our private fleet," boasts Collins, "you can schedule those trucks for a certain time, and they'll be there on the dot. That's why we're truckers at heart."

Generally, Fleming Companies, Inc. hires out its private fleet, although Fleming Foods of Pennsylvania does not. This Fleming subsidiary, however, does look for major manufacturers, such as Del Monte and Campbell Soup, that offer backhaul programs ("Super (Market) Strategies: Grocery Trucking Comes Full Circle," February, p. 54). As a selling point to its own customers, Fleming provides direct store delivery and commodity grouping.

At one time, Fleming Foods received as much as 20 percent of its inbound by rail. The company has room for nine boxcars in its 611,000-square foot facility. These days, it is rare to see two. Now, because so little of the company's inbound comes by rail, Collins can't say whether there have been any changes since boxcar deregulation.

Piggy Facts

William Morgan, director-traffic, Frito-Lay, Dallas, says, "We're seeing an increase in the use of piggyback as compared to the past. I think there's a place for both rail and motor carriers and I think that place is not one of competition, but one of intermodal cooperation.

"If that happens," Morgan says, "the railroads will do the thing they do best-haul a vast amount of tonnage a long way with a minimum of manpower in a very fuel-efficient way. And trucks will do the things they are uniquely equipped to do-pick-up, deliver and run the short haul.

"When you have a lot of piggyback trains running over long distances, you'll have a lot of trucks making pickups and deliveries at both ends of the line. That's optimizing the system."

That, of course, is what has already been happening as piggyback service continues to grow. But it could also mean there wouldn't be much of a role left for boxcars.

"The railroads may be able to compete with trucks on the piggyback level, in terms of merchandise and packaged food, but not with boxcars," Morgan believes. "If the shipping public has no sense of urgency, then boxcar deregulation will take truck traffic. But I don't think that will be as widespread as some people think."

Deregulation Sophistication

But shippers aren't writing boxcars off completely. For example, Norbert Leiberg, director-transportation services for the Kellogg Co., Battle Creek, Mich., reports that his department does not "foresee changes in our basic rail costs." But at the same time, Leiberg notes, deregulation has forced Kellogg to put its computers to work developing more sophisticated cost-analysis programs.

"There's more concern over railroad costing and commitment from the carriers under a contractual arrangement," Leiberg says. "And I think boxcar deregulation will provide us with the same opportunities contractual arrangements have. If we find a need for a particular piece of equipment or service, we talk to the carrier we think can provide it, and discuss it rationally."

Leiberg contends that talk of competition between railroads and truck lines is "a bit like comparing horses and mules." He agrees with Frito-Lay's Morgan. "There's a difference in the service each has to offer. Each has a niche in the distribution of grocery products. From our perspective, the railroads really haven't paid that much attention to their niche over the last several years. But since deregulation, they have become a little more concerned about the competitive aspects they now have to face.

"We aren't turning away from railroads," Leiberg says. "We just want to give our customers the choice that fits their particular needs-whether it's a customer pick-up, a truck or carload. If they prefer carload, we foresee being in the rail business for a long time to come."

WOW!

Kellogg is one shipper that does not agree railroads cannot come up with a competitive time service. The cereal maker has already seen evidence to the contrary.

"The possibility of time service by rail has already been demonstrated to us by Conrail's 'Warehouse On Wheels (WOW)' service," Leiberg reports. "The Kellogg's-Conrail WOW service has been, and

continued

is, a time-service train. It's a scheduled block of cars moving out of Battle Creek within a given time frame. It connects with eastbound trains of Conrail for distribution in certain terminal areas within our market area."

Conrail says its WOW service provides up to 48-hour faster delivery of shipments from the Battle Creek cereal manufacturer to its East Coast customers. Under the WOW system, boxcars, which act as "rolling warehouses," move loads of cereals by rail over the weekend, and arrive at local yards in time for rapid distribution early each week to meet retailers' needs.

Noting that car movements from Kellogg on an "as-needed" basis caused transit delays at the receiving end, Conrail and the Kellogg's transportation department arranged a schedule that calls for a weekly train that leaves Battle Creek by 9:00 AM every Friday. By midday, the cars are being grouped into trains at Conrail's major freight car classification yard in Elkhart, Ind., for movement to four major Conrail terminals. From there cars travel to any of 60 cities throughout the Northeast.

"Kellogg asked Conrail to design a service that would convince East Coast customers to keep using rail delivery of their shipments instead of switching to trucks," says James A. Hagen, Conrail's senior vice president-marketing and sales. "Kellogg and Conrail both adjusted their operating patterns, enabling Conrail to protect this traffic from diversion to another transportation mode, as well as increasing the volume of such shipments moving on Conrail."

Kellogg now ships an average of 50 cars per week via WOW rail service on Conrail.

WOG!

Even with the advent of innovative services such as WOW, however, a vital role in grocery distribution must still be played by the old standby, the warehouse on the ground (WOG?). Progressive things are happening in this area, too, largely because of what Arthur Klawans cites as one of the biggest issues in the grocery industry today-electronic data communications within manufacturers' warehouses, and among those warehouses and the retail stores.

"As interest rates went down, and union busting started to take place," the NFDA vice president reports, "everybody became interested in mechanization and automation that could ultimately help them reduce the number of people in the warehouse. The retailer and the manufacturer are going to continue to strive to reduce inventory, and machines help you do that, too.

"Right now, there are all sorts of federal incentives on equipment and capital expenditures," Klawans states, "so with taxes and interest rates slipping down a little bit, management will be motivated to unpeople the warehouses."

In data communications, the food industry developed UCS (Uniform Communication Standard), computer-to-computer communication which reduces paperwork, clerical labor and ultimately, inventory. WINS (Warehouse Information Network System) will one day be to warehouses what UCS is to the grocery manufacturers, retailers and wholesalers.

Klawans feels the public warehouse is "getting smarter on its calculations of labor costs, space costs, space utilization and labor. But public warehouses will be the last to mechanize and automate," he adds, "because their transiency of customers makes it difficult for them to build one mechanized system that will accommodate all customers. Public warehouses do not have a lot of long-term contracts, so they're not going to buy a lot of hardware that won't accommodate everybody.

Glen Anderson, director-distribution center operations for Del Monte in San Francisco, says his company uses computer modeling to establish minimum and maximum inventories in the warehouse by item. "We are working to decrease inventory," Anderson reports. "Defining costs and understanding how they are allocated back to the users and the product groups is one of the most active areas at Del Monte right now; it's a big issue."

Fleming Foods warehouse manager Bill Urban says his company is moving quickly into warehouse computerization. But for the moment, it has given up on trying to mechanize its order picking. "We used to use a certain brand of automatic picker," says Urban, "but it was removed because we found we could be more productive without it. We expected 40,000 picks per day and only got 32,000. So now we pick all 80,000 manually.

"We have been very successful with computerization and we want to do more of it," Urban adds enthusiastically. "Right now, we have purchase orders, the master order schedule and the inventory item file on line."

The future role of boxcars may still be in question, but you can bet they won't be building something called the "Bit Byte Hilton" for a long time to come. As long as they have the help of data-hungry computers, and a horn of plenty of transportation options at their disposal, distribution managers for the companies that make your groceries shouldn't have any trouble keeping your food stores well-fed. ☆

DISTRIBUTION COSTS IN GROCERY MANUFACTURING

	Distribution Costs As A Percentage Of Sales			
	Total Food Products	Dry and Packaged	Canned	Temperature Controlled
Transportation	5.03	5.07	4.96	5.12
Warehousing	1.71	1.80	1.48	1.96
Order Processing/ Customer Service	0.23	0.30	0.17	0.24
Distribution Administration	0.26	0.37	0.22	0.11
Inventory Carrying (@15%)	1.23	1.07	1.35	1.25
Other	0.46	0.04	—	0.91
Total	8.47	8.60	8.18	8.75
Product Value ($/lb)	0.94	1.14	0.59	1.20

This data was provided by Herbert W. Davis and Co. from its 1983 Physical Distribution Cost Database. It covers 35 companies with an average sales revenue per company of $536 million in 1983. The companies reported costs on a sales base of approximately $20 billion. Note: Figures in columns do not add up to the total because some companies did not report all data.

WHO'S WHAT IN BROKERING

The field of freight brokering is expanding so rapidly that shippers now need a scorecard to identify the players. Here are the names, numbers and vital statistics of nearly 100 brokering operations that responded to a recent DISTRIBUTION questionnaire. There are plenty more out there where these came from, and we'll be back with more listings at a later date. In the meantime, these should help you start sorting out the superstars from the benchwarmers.

By Bruce Heydt, Associate Editor, and Joseph V. Barks, Editor

WEST
(Ariz., Calif., Colo., Id., Mont., Nev., N.M., Ore., Ut., Wash., Wyo.)

Co. name, location	Principal contact	Primary business	Other services	Authorities held	Equipment specialties
[illegible] Denver	David Gray, owner (303) 295-3456	brokering TL freight	broker LTL, air freight, consol	broker/ Feb 1983	reefers, flatbeds, vans
[illegible] Anaheim, Calif.	Bob Walters, president (714) 937-1201	brokering, all modes	consulting	broker/1975	most types
[illegible] Spanaway, Wash.	Ted Robinson (206) 537-2610	brokering TL freight	48-state common and contract carrier	48-state common and contract auth'y	flatbeds
[illegible] Seattle	Jack Mallory, vp (206) 622-9355	brokering LTL freight	TL, air & customs brkr, consol, foreign frt fwdg	property broker/1978	reefers, flatbeds, vans
[illegible] W. Hollywood, Calif.	Jim, dispatcher (213) 877-8766	brokering TL freight	LTL brkr, consulting, consolidating	property broker/ Apr. 1981	reefers, flatbeds, vans
[illegible] Compton, Calif.	Harry Wilkes, trf mgr (213) 537-1432	trucking	brokering, whse, consol, pool dist	broker/'80, 48-state authority/'82	flatbeds, vans
[illegible] Yuba City, Calif.	Carl Marion, vice pres (714) 669-0304	brokering LTL freight	warehousing, container swing, TL frt consol	broker/'82,	vans
[illegible] South El Monte, Calif.	Thomas Reed (213) 443-7158	brokering TL & LTL freight	warehousing	broker, gen'l commodities	flatbeds, dropdecks
[illegible] Lake Oswego, Ore.	John Wetzel, oper mgr (503) 635-3474	brokering TL freight	carload and piggyback freight	transport brkr, contract carrier	flatbeds, vans
[illegible] Billings, Mont.	Gene A. Radermacher (406) 245-5132	brokering TL freight	LTL, air brkr, consolidating, consulting	broker/March 1983, motor carrier/1983	reefers, flatbeds, vans
[illegible] City of Industry, Calif.	Roy Larsen, president (213) 912-9478	brokering LTL freight	TL brkr, consol, pool dist, whse, piggyback	motor carrier/ April 1983	reefers, flatbeds, vans

There are brokers, and then there are brokers. Boy, are there brokers.

There are companies that have been in the business of brokering freight, and only that business, for generations. Then there are shippers, carriers, warehousers, forwarders, consolidators, consultants, and entrepreneurs that have obtained a property broker's authority from the Interstate Commerce Commission (ICC) because it's become all the rage of a deregulated age.

The funny thing is, there's a need for all these types of brokers, and the many more that exist. Deregulated distribution means brokering can make sense for all sorts of shippers in all kinds of ways. One shipper may prefer to use a broker that's just starting out; another may want one with vast experience. One may prefer a "pure" broker, another a broker that can offer other services as well.

But finding the broker that's right for you has been no easy task in a time when companies of all sorts have been obtaining brokering authority almost as fast as the ICC can cash their checks.

That's where we come in.

Last December, we mailed a questionnaire to the members of the Transportation Brokers Conference of America (TBCA). We told the recipients of the survey that we wanted to compile a broker service guide that shippers could use to narrow their options.

We realize that not all brokers are members of the TBCA. We also realize that the membership of that burgeoning group, and of the brokers' ranks in general, continues to expand almost by the day. And we also realize that we could not hope to get information back from all the companies that received our questionnaire.

So what's on the rest of this page and the eight that follow is by no means intended to be a listing of every broker currently operating in the U.S. But we think it represents a pretty good start. The response to our mailing was unusually high (nearly 40 percent), and we imagine it won't be too long after this is published before many of the other 60 percent, and a lot of new companies, seek us out. So we'll be back, no doubt, with plenty more names and numbers before the year is out.

Before we let you plunge into this first helping, though, a final word about some of the data we're including in these listings. We modeled the survey around questions shippers and other brokers told us they thought were important to any selection of a broker. Some of these questions got pretty specific, such as those reflected in the columns which show total movements, total tonnages, and the number, and names, of the carriers and shippers involved.

Many of the brokers we surveyed voiced objections to our asking for this information. "Who we do business with is our bread and butter!" is how one put his complaint. But, we told all who expressed reservations, that's what shippers told us they wanted to see; each broker would have to decide whether it should comply.

As you can see from what follows, some did, and some didn't. Maybe you can get those who didn't supply any "references" to fill in the blanks. ☆

Community or industry specialties	Regional specialties	No. of carriers brokered to in '83/ top 3 (if given)		No. of shippers brokered for in '83/ top 3 (if given)		Total movements in '83	Total tonnage in '83	No. of employees	Computer capabilities?
general & heavy haul	nationwide	110	TNT Services Overnite Trans WNI	20	Aspen Furniture Pillsbury Audubon Park Co	251-500	10.4M lbs	3	no
general freight	nationwide	261	Transcon ABF PIE/Ryder	200	Vons Grocery Sav-On Drug Boyle Midway	over 750	600K tons	20	yes
general freight	nationwide	150		200		over 750	50M tons	14	yes
import and retail	nationwide	15		100		over 750		60	no
retail	nationwide	28	Interstate Coast Carloading Roseway, Inc	31	S & W Fine Foods Allied Supply Kern	251-500	500K tons	8	no
general freight	California	7		25		1-100	2.5M tons	800	yes
retail, wholesale	nationwide	20	Bristow Truck Continental Warren Cty Frt	40	Maruchan, Inc Bostrum Warren Kwit Set-Emhart	over 750	3M lbs	5	no
over-dimension loads	nationwide	50		200		over 750		10	no
bldg mat'ls	nationwide	1100		217		over 750	80K tons	9	yes
bulk	nationwide					251-500	8000 tons	4	no
retail, heavy haul	nationwide	64		45			67.5M tons	8	yes

Co., city, location	Principal contact	Primary business	Other services	Authorities held	Equipment specialties
BLADON & ASSOCIATES Seattle	Arthur Nolan (206) 623-1023	custom-house brkr	TL, LTL, air brkr, pool dist, consol, consult, whse, fwdg	property broker	
L.W.T., INC. Glendora, Calif.	(213) 335-6664	brokering TL & LTL freight	air broker, pool dist, warehousing, consult, consol	20-state gen'l commodity	40', 45' vans
JOHANSON TRANSPORTATION SERVICE Fresno, Calif.	R. Johanson, president (209) 486-0540	brokering TL freight		property broker/1981	all types except tank trucks
R & R TRUCK BROKERS, INC. Central Point, Ore.	Gary or Wes (503) 773-3993	brokering TL freight	LTL brokering	brcker's license/ April 1981	flatbeds, vans
REFRIGERATED DISTRIBUTION SERVICES, INC. Placentia, Calif.	J. G. Shaw, gen'l mgr (714) 993-9700	brokering TL freight	LTL, air brkr, consulting	property broker, contract carrier	reefers, vans
ROCKY MOUNTAIN NATIONAL TRANSFER Denver	Gary Howie (303) 355-4698	brokering LTL freight	brokering TL freight, consolidating	property broker, 1982	all types
R. C. SCHREIBER PRODUCE Springdale, Ariz.	Phil Owens, mgr truck (501) 751-4602	brokering TL freight	produce broker	gen'l comm carrier/April 1983	reefers, vans
7/24 FREIGHT SALES INC. Modesto, Calif.	Ed Heyman, president (209) 545-1101	brokering TL & LTL freight		property broker/Nov 1980	reefers, flatbeds, vans
TRAILER EXPRESS Seattle	Dick Jones (206) 282-1640	brokering TL & LTL freight	consulting, consolidating, TOFC service	property broker	reefers, flats, vans, containers
TRANS-ACTION INT'L TRADE & TRANSPORTATION Huntington Beach, Calif.	Arlie Beery (714) 842-1000	brokering TL freight	LTL, air broker, consulting	property broker	reefers, flats, vans
TRUCK DISPATCH SERVICE, INC. Fresno, Calif.	Tom Kourafas, vice president (209) 486-7920	brokering TL & LTL freight		property broker/Jan 1982	reefers, flatbeds, vans
UNITED CALIFORNIA FREIGHT CORP. Redondo, Calif.	Ken Moore (213) 303-3551	factoring of freight billings			
VAN FOX WEST, INC. Vista, Calif.	Nick, Sandy, Roy (213) 704-4768	brokering LTL freight	consolidating, warehousing	property broker/Oct 1982	reefers, vans

NORTHEAST
(Canada, Conn., Mass., Me., N.J., N.H., N.Y., Pa., R.I., Vt.)

A. P. G. SERVICES, INC. Somerville, Mass.	Dan Storm (215) 384-3340	brokering TL freight	LTL brokering, consolidating, warehousing	property broker/Feb 1983	flatbeds, vans
ABS TRANSPORTATION CO., INC. Somerset, N.J.	Betty Sendziak (201) 782-3904	gen'l commodities carrier	TL, LTL & air frt, pool, whse, fwdg, consol, consult	common carrier/'83, brkr/'83	van, flat, bulk, protective
ATLANTIC CARGO, INC. Doral, Fla.	Harris Brown, president (717) 655-9601	freight forwarding	customs brkr, foreign air, ocean forwarding	property broker	all types
BAY COM CORP. Somerville, Mass.	S. Hurvitz, president (617) 623-5620	warehousing	brokering TL freight, pool distribution	broker	vans
EASTERN DISTRIBUTION Hanover, Pa.	Janet Gohlke, oper mgr (201) 634-2300	brokering TL freight	consulting	broker's license, May 1983	reefers, vans
	Michael Dammer (800) 645-7210	brokering LTL freight	TL, air broker, warehousing	household goods/1963	air-ride padded vans
	James J. Maloney (215) 331-7000	brokering TL freight	LTL brkr, consol, consulting, whse, pool dist	property broker/1979	most types
	Joseph Dawson (215) 368-0670	brokering TL & LTL freight	consulting	property broker	reefers, flatbeds, vans

Commodity or industry specialties	Regional specialties	No. of carriers brokered to in '83/ top 3 (if given)		No. of shippers brokered for in '83/ top 3 (if given)		Total movements in '83	Total tonnage in '83	No. of employees	Computer capabilities?
retail	midwest	25	PIE IML Consol Freight	200	American Motors American Honda Contec Electronic	over 750	75M lbs	40	yes
general freight	east	4				over 751		32	no
general freight	nationwide					7000		21	yes
general freight	nationwide	750	E. W. Wylie Arlo Lott Cardinal	450	Cascade Empire United Lumber Jeld-Wen	6000		16	yes
electronics, health care, chemical	Southern Calif to AR and TN	14		6		101-250	1300 tons	4	yes
general freight	Rocky Mtns.	14	CKM ICX WNI	67		over 751		5	yes
retail	nationwide	150		20		251-500		35	yes
general freight	nationwide and Canada							8	yes
general freight	nationwide					5000			yes
retail	nationwide	18	Inway/Div IU Melton Truck Int'l Trans	20	Toyota Hydro-Spa Cambridge-Lec		12M lbs	3	no
general freight	west					over 750		14	no
								15	no
retail, wholesale	CA east to Chicago, north to MD	60		40		over 750	5M tons	3	yes
general freight	eastern US	31		78		over 750	62.5K tons	5	no
general freight	nationwide	2		373		900	1750 tons	85	yes
general freight	nationwide	10		100		over 750	1000 tons	9	yes
retail	mideast, middle-south							10	no
general freight	east to midwest, midsouth	53		39		501-750	27K tons	5	yes
high tech	nationwide					1-100	5000 tons	50	yes
general freight, bulk	nationwide	40		80		4000		4	yes
general freight	Pa-N.J.-Del							12	no

Co. name, location	Principal contact	Primary business	Other services	Authorities held	Equipment specialties
DUNSMITH INTERNATIONAL Mississauga, Ontario	Spencer Dunn, president (416) 272-4332	brokering TL freight	LTL brkr, consulting	property broker/May 1983	reefers, flatbeds, dump trucks
GRANITE ENTERPRISES, INC. New Haven, Conn.	Don Dillon (203) 874-1341	brokering LTL freight		property broker	45' vans
INTERCITY LINES, INC. Hardwick, Mass.	David M. Wilson (413) 967-3066	brokering LTL freight	TL broker, consolidating, automobile transport	broker & common carrier/ 1981	reefers, vans
INTER STATE EXPRESS INC. Brooklyn, N.Y.	Marvin Rosenberg (212) 387-8700	freight forwarding	TL, LTL broker, consolidating, consulting	frt fwdg/ 1936, frt brkr/1982	vans
LA FLEUR'S TRUCKING SERVICES, INC. Manchester, N.H.	Jerald Larson, dir/ops (603) 625-2840	brokering TL freight	LTL, air broker, warehousing, consult, consol	broker, contract carrier/ April 1982	reefers, flatbeds, vans, drops
MEL LOESER ASSOCIATES, INC. West Orange, N.J.	Mel Loeser (201) 736-3804	brokering TL freight	LTL brokering, warehousing	property broker/March 1981	reefers, flats, vans dump trucks
ROSE MARCHESANO & ASSOCIATES Garden City, N.Y.	Rose Marchesano (516) 248-4688	consulting	TL, LTL brkr, consol, frt fwdg, warehousing	broker's license/ March 1983	most types
MATCHMAKER TRANSPORTATION SERVICES, INC. Trumbull, Conn.	Jim Skane, president (203) 268-6153	brokering TL freight	consulting	broker	reefers, flatbeds, vans, bulk
BAKANIKA TRANSPORTATION CONSULTANTS New York	Alexander Smirnoff (212) 632-0656	brokering LTL freight	TL, air brkr, pool, consult, whsing, shipper's agent	gen'l comm broker/1982	all types
STANZOL, INC. Cathara, N.J.	E. H. Stanzol, president (201) 635-8616	brokering TL freight	warehousing, customs consult, ocean charter, barging	transport broker/Nov 1983	
TRANSTOP, INC. Boston	Don Wright, vp, gen'l mgr (617) 268-4720	brokering LTL freight	TL broker, pool dist, warehousing, consol, consult	property broker/1968	reefers, vans
J. A. TUCKER CO. Vineland, N.J.	Bill Tucker (609) 456-2000	brokering TL freight	consult, consol, hvy haul, irreg routes (incl Can.)	brokers license/1961	all types
VALLEY DISTRIBUTING AND STORAGE CO. Lititz, Pa.	John Karezewski (717) 654-6730	warehousing	TL, LTL broker, consolidating, pool distribution	broker's license/1983	flatbeds
VERTEX ASSOCIATES TRANSPORTATION, INC. Rochester, N.Y.	Wayne Parry (716) 334-2813	brokering TL freight		broker's license	reefers, flatbeds, vans
WEIR TRANSPORTATION SERVICES Arlington, Mass.	George Weir (617) 849-1778	household goods brokerage	TL broker, whse, distribution, international	gen'l comm broker	padded vans

MIDWEST

(Ia., Ill., Ind., Kans., Mich., Minn., Mo., Neb., N.D., Oh., S.D., Wis.)

AAE W. SMITH CO. North Kansas City, Mo.	Garv Bain, president (816) 455-1118	brokering TL & LTL freight	consulting, freight payment	property broker	reefers, vans
ABLE GROUP LTD. Downers Grove, Ill.	Al Lemke (414) 271-9565	brokering LTL freight	TL frt, frt fwdg, consult, consol, pool dist, containers	property broker/1978	general
ALLIED TRANSPORTATION SERVICES, INC.	Dave Blair, reg mgr, (612) 450-1222	brokering TL freight	LTL frt, consult, pool, whse, fwdg, air frt, consol	prop brkr/'74, motor carrier opr auth/'78	most types
	Darlene, Fern (701) 772-6681	brokering TL freight	LTL brkr, trip-leasing, consol, licensing	48-state gen'l commodity/'82	reefers, flatbeds, vans
	Thomas Corbett (216) 433-7711	brokering TL freight	LTL broker, pool dist, consulting, consolidating	property broker/1981	
	Herb Kotzen, vice pres (612) 937-8500	brokering TL freight	LTL brokering, consulting	general comm motor carrier/ 1972	reefers, vans

Commodity or industry specialties	Regional specialties	No. of carriers brokered for in '83/ top 3 (if given)		No. of shippers brokered for in '83/ top 3 (if given)		Total movements in '83	Total tonnage in '83	No. of employees	Computer capabilities?
	nationwide	125	TNT Services LAIDLAW Fredericks	170	Anthes, Inc. U.S. Steel Dominion Nickel	3600	57.6K tons	9	yes
manufac-turing	New England	3		25		251-500		3	no
food, paper, plastics	New England to over 500 miles	30		12		501-750		7	yes
retail, general freight	NY, NJ, Conn to west and south	3	Oneida Pilot Inway	7		over 750	4M tons	4	no
retail, general freight	nationwide specializes in East	75	CDL Transport Rush Transport	116		over 751		8	yes
department store-mfg	northeast, southeast, midwest	27				over 750		1	no
general freight	nationwide and Italy, Switzerland	42	P. Marckesano Matlack Graebel Van	19	MAC-USA Hanley Brick Lomar Sales	251-500		4	yes
retail, chemicals, bldg mat'l	nationwide and Canada	45	Prime CCC Navajo	20	Woolworth Penney Amer Cyanamid	3500		6	no
pharmaceut-icals, bus-iness equip	nationwide	62	Transus Bass Transport Profit Freight	58	Savin Corp A.M. Intl Amersham Corp	over 750	15K tons		yes
bulk	great lakes, east & gulf coasts	0		0			-0-	1	yes
general freight, food	New England, NJ, NY, PA, midwest	25		300 to 400		72K	250M lbs	12	yes
general freight	nationwide	75		300		over 750	100M-200M lbs	12	yes
retail	east coast, midwest	15		6		101-250	5K tons	3	yes
general freight	nationwide	35	Countrywide March Trans Barnes	25	Mobil Chemical Xerox Bausch & Lomb	over 750	200M lbs	5	yes
general freight	internat'l		Red Ball UVL Agent Movers			251-500		2	no
general freight	nationwide	17		100		over 750	96M lbs	3	yes
retail	north central	10				501-750		3	no
general freight	internat'l	14		336		26K	241M lbs	39	yes
bldg mat'ls, food, paper	nationwide	325		250		3000	45K tons	7	yes
		15		50		251-500		5	yes
retail, food	nationwide	1000		1000			1800 tons	450	yes

Co. name, location	Principal contact	Primary business	Other services	Authorities held	Equipment specialties
[illegible]	John Ferree (219) 932-6264	brokering TL freight	consulting, warehousing	broker/July 1982	reefers, flatbeds, vans
[illegible]	Bob Flaa, president (312) 398-2607	brokering TL freight	brokering LTL frt, consolidating	property broker/Nov 1983	
[illegible]	Jim I. Starkebaum (816) 471-6141	freight bill post-audit	TL, LTL, air brkr, consult, consol, pool dist, billing	property broker	reefers, flatbeds, vans
[illegible]	Walter Rudin (313) 292-3350	brokering TL freight	LTL broker, pool dist, consulting, warehousing	property broker/June 1983	reefers, dropdecks, flats, vans
[illegible]	Mike Abbott (612) 631-9041	brokering TL freight	LTL consolidation and distribution, warehousing	frt frwdr/ Jan '80, brkr June '83	reefers, vans
[illegible]	Mary Harvey (816) 737-3691	brokering TL & LTL freight	consolidating, consulting, back-haul coodination	broker/Feb 1983	reefers, vans
[illegible]	Hank Urycki (216) 526-2515	consulting	brokering TL & LTL freight, consolidating	contract carrier	all except bulk
[illegible]	Mark Shank, president (417) 358-1255	brokering TL freight	consulting, filing of author-ity applications	broker/Oct 1983	reefers, flatbeds, vans
[illegible]	Ronald Williamson (312) 351-3060	brokering TL freight	LTL, air brkr, consol, consult, pool distribution	property broker/1981	reefers, flats, open tops, vans
[illegible]	Terry Erny, oper mgr (219) 937-1403	brokering TL freight	consulting, warehousing	broker/1983	flatbeds
[illegible]	Bruce Brown (312) 677-4708	brokering LTL freight, pool dist	small shipment delivery	general commodity	small trucks
[illegible]	D. R. Tagnoni, gen'l trf mgr (800) 325-7171	freight forwarding	TL brokering, consolidating, dist, forwarding	property broker, 1982	flatbeds, vans
[illegible]	Michael Chromcik (312) 298-8800	brokering TL freight	brokering LTL, pool distribution, consol, consult	property broker	reefers, vans
[illegible]	D. J. Hickey (312) 890-0660	brokering LTL freight	TL brokering, consolidating, consulting	freight broker/1983	flatbeds, vans
[illegible]	Alan Singer (216) 494-9435	brokering TL freight	LTL, air broker, consulting, frt forwarding	property broker/1983	general
[illegible]	Vince Koster, president (216) 468-0404	brokering TL freight	LTL broker, whse, consolidating, consulting	contract carrier/1982	reefers, flats, vans, lowboys
[illegible]	M. J. Glen, (800) 874-7229	brokering TL freight		property broker/1982	reefers, vans
[illegible]	Charles Wickman (312) 246-9090	brokering TL & LTL freight	consulting, frt forwarding	property broker/1980	reefers, flatbeds, vans

SOUTH/SOUTHWEST

Ala., Ark., Del., Fla., Ga., Ky., La., Md., Miss., N.C., Okla., S.C., Tenn., Tex., Va., W.V.)

[illegible]	C. Brinkley (501) 375-1324	brokering TL freight	whse, pool dist, consol, consult,	contract 48-state, 1981	reefers, flatbeds, vans
[illegible]	Andy Pierce, gen'l mgr (214) 239-3095	brokering TL freight	contract gen'l commodity carrier	contract gen'l commodity	reefer, van
[illegible]	A. Wagonhouser, mgr oper (800) 233-0624	brokering TL freight	LTL frt, consol, intermodal dist	brokers license trucks	vans, tank

Commodity or industry specialties	Regional specialties	No. of carriers brokered to in '83/ top 3 (if given)		No. of shippers brokered for in '83/ top 3 (if given)		Total movements in '83	Total tonnage in '83	No. of employees	Computer capabilities?
chemical, steel, paper, plastics	nationwide							5	yes
food, chemical	nationwide	8		26		251-500	5500 tons	3	no
general freight	nationwide							29	yes
wholesale, retail, mfg. food	east, south midwest, southeast	75		30		over 750	45.5 tons	7	no
general freight	nationwide and Canada	120		400		1500	46M lbs	10	yes
general freight	nationwide	40 to 50	TDS Transport Trinity Paper Northstar Trans	36		1500	60M tons	3	yes
general freight	nationwide including AK and HI	5		5		over 750		6	no
mfg goods, raw mat'l, groceries	nationwide	36	Shower Truck TJS Trucking K & H Trucking	21	Helena Chemical Assoc Grocers Leggett & Platt	501-750	19M lbs	4	yes
food, paper, plastics	Chicago, Wisc, Ind	80	Prime Crete Carriers Ace Trucking	175	Willy Wonka Candy Ozite Corp Motorola	over 750	108M lbs	8	no
steel	northeast	5		41		26K		12	yes
general freight	Chicago & northern Illinois					over 750		30	no
retail, industrial	nationwide	10		50 to 60		1300	30M lbs	300	no
retail, grocery	from SE/NE to points in U.S.	17		128		over 750	30M lbs	11	yes
chemical bulk/pkgd	nationwide			15		251-500	750K tons	9	no
general freight	nationwide	15	Action	30	Amltome MSAS Westinghouse	101-250	3M tons	3	no
general freight	nationwide	30		55		over 750		4	no
general freight	eastbound, northbound			200		over 750	200K tons	4	yes
retail		350		18				4	yes
general freight	nationwide	75		38		251-500	6M tons	3	yes
retail	nationwide	1260		100		2000	84M lbs	4	yes
general freight	middle Atlantic	30	Contract Cargo Ferree Transhield	58	Owens Corning Purex Western Electric	6000	100K tons	5	yes

Co. name, location	Principal contact	Primary business	Other services	Authorities held	Equipment specialties
	Buryl S. Martin (804) 798-1477	brokering TL freight		brokers license	reefers, flatbeds, vans
	Darvin Kuehl, president (800) 237-9617	brokering TL freight	heavy & specialized transport, rigging, whse	property broker/Dec 1981	flatbeds, lowboys
	Tom Van Sandt (205) 326-0490	brokering TL & LTL freight	consol, consult, frt fwdg, bulk mat'ls handling	48-state general commodity Feb 1983	all types
	Wayne H. Theus, pres (405) 722-4210	brokering TL freight	consulting	property brkr, common carrier	flatbeds, dry bulk, tanks, vans
	Jack Flowers, president (305) 625-2123	brokering TL freight	LTL, air broker, consolidating	property broker/Feb 1982	reefers, flatbeds, vans
	Mike Parrett (601) 842-7815	brokering TL freight	LTL, air, piggyback brkr	broker/July 1982	reefers, flatbeds, vans
	Stephen McKenna (404) 452-7903	brokering TL freight	LTL brkr, air frt consolidating, consulting, ocean	brokers license/Nov 1980	flatbeds, vans
	Mike Thielke, int'l mgr (800) 336-4533	freight forwarding	brokering, warehousing, consolidating		flatbeds
	Andrew T. Flanagan (404) 928-0322	brokering TL freight	LTL brkr, consulting	48-state common irreg route	reefers, vans
	Jack Jones, president (800) 554-6704	brokering TL & LTL freight	air brokering, pool distribution, consult, consol	property broker/July 1982	vans railcars, piggyback
	Dale Ballard, president (405) 236-4402	brokering TL freight		general commodities/ Nov 1980	reefers, flatbeds, vans
	Roy Martin (205) 350-6611	brokering TL freight		general commodities/ Aug 80	reefers, vans
	Victor L. Vaughan (615) 360-1180	brokering LTL freight	consolidating, warehousing, consulting	general commodities brkr/June '83	45' & 48' dry vans
	Paul Caplinger (318) 222-7661	brokering TL freight		motor carrier/ April 1983	flatbeds, vans
	Harland Smith (501) 735-7500	brokering TL freight		property broker/April 1982	reefers, vans
	Oland Barnes, president (919) 237-5781	brokering TL & LTL freight	pool dist, whse, consol, consult, freight analysis	property broker/1968	reefers, vans
	John Anderson (800) 345-8137	brokering TL freight	LTL, air broker, consulting, frt forwarding	motor carrier/ Nov 1980	reefers, flats, vans, specials
	Mark Bays (919) 272-9064	brokering TL freight	LTL, air brkr, fwdg, pool dist, whse, consol, consult	property brkr/ '82, contract carrier/'83	45'high cube vans
	Ken Davis, brkrage mgr (205) 939-1516	brokering TL freight	LTL broker, sales, consulting, tariff publication	property broker	all types
	Thomas Banks (405) 789-9544	brokering TL freight	custom designed transportation programs	property broker/1980	vans
	Mary Perkins, sales (404) 968-1206	brokering TL freight	brokering LTL freight, pool dist, consolidation	property broker, 1980	reefers, flatbeds, vans
	Charles Chapman, vp (803) 665-8685	brokering TL freight	trucking	broker/1981, contract carrier	flatbeds
	Bill Cantillon (305) 725-3611	brokering TL freight	trucking, freight forwarding	motor carrier/ 1981	flatbeds, vans

general freight	nationwide	94		32		over 750		5	no
industrial plant machinery	nationwide	25	Farm Ser & Sup Todd Trans Melton Truck	100	General Motors American Stair Park Rubber	over 750	9.6M tons	5	no
bulk mat'l	Alabama ports	23	Chem-Haulers Carthage Lane Trucking	51		over 750		5	no
general freight	nationwide	26	Melton Truck Brown D & L	43	Kerr McGee Corp Ralston Purina National Can	251-500	10M tons	2	yes
general freight	nationwide	300		210		over 750	3.5M lbs	4	yes
general freight	nationwide	18		25		501-750		8	no
intermodal, ocean gen'l freight	east of Miss. and Texas					1500	55.2M lbs	6	no
HHG, gen'l freight	internat'l							250	yes
retail				16				4	no
general freight	nationwide	100	Neely Thurston RCA	100,000	P & G Mobil Chemical Durkee Foods	5000	1M tons	5	yes
HHG, bulk, explosives	nationwide	3		20		2000	80M lbs	3	yes
general freight	nationwide	50		100		1000	40M tons	5	yes
auto parts	nationwide	53	Crete Carrier Conalco MMT Trucking	12	Maremont Corp Worldparts Perfect Equip	over 750	110K tons	21	yes
general freight	nationwide	15		200		251-500	8K tons	3	no
general freight	middle-south					101-250		2	yes
retail	nationwide	50	RTC Wingate A&G	24	Eljer Plumbing Kemp Furniture Union Carbide	101-250	3M lbs	7	yes
retail, mfg products	eastern PA, NYC, NJ, CT, DE	125	Service Leasing Great Coastal MS Carriers	75	Lionel Leisure Woolworth Gottesman	1500	45M lbs	10	yes
general freight	internat'l	872	Bonney Schneider	257	Triad Plastics Tile Source Schlitz Brewery	over 2000	21K tons	10	yes
food, paper, hardware	nationwide	60		40		101-250	7M lbs	10	yes
industrial	nationwide	15		25		101-250	48M lbs	1	no
general freight	nationwide	60	Bowman Trans Jones Trucking Neely Trans	150		over 750		10	yes
flatbed freight	east coast	100		100		over 751	147M tons	7	yes
general freight	Florida, Ohio, California	77		14		101-250	250K lbs	150	yes